

## ERISA/Benefit Plan Investors

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Review transactions with ERISA plan investors (401k plans, pension plans including Taft-Hartley plans, Keogh plans, IRAs, etc.) in pooled investment funds managed by private fund managers for compliance with applicable ERISA requirements including fiduciary responsibility, QPAM status, plan assets rule, prohibited transactions and exemptions therefrom. Review fund offering documents for provisions that address both ERISA plan investors and plan investors other than ERISA plan investors, such as US state and local government and foreign pension plans.